PREPARE FOR DIGITAL PRESERVATION: IDENTIFYING, ASSESSING, AND PRIORITIZING

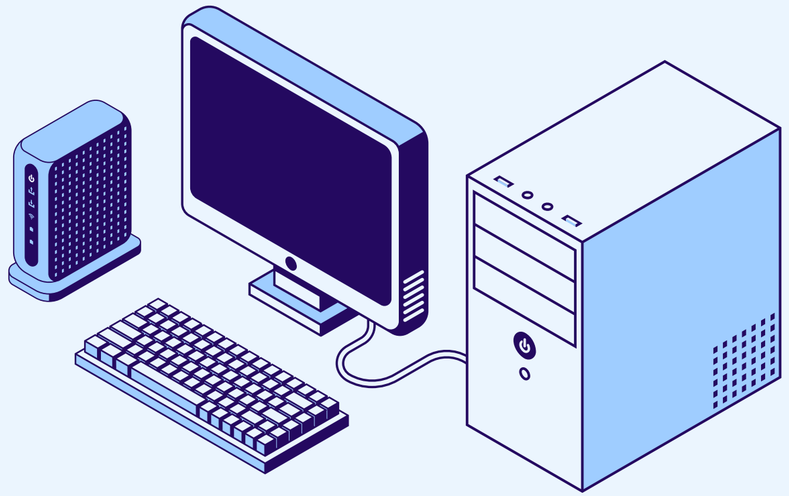
Digital Preservation Training Webinar #2

April 14, 2026 | 12:00PM (PT)

CALIFORNIA REVEALED

GROUNDWORK GRANTS

California Cultural Heritage Disaster Preparedness Project

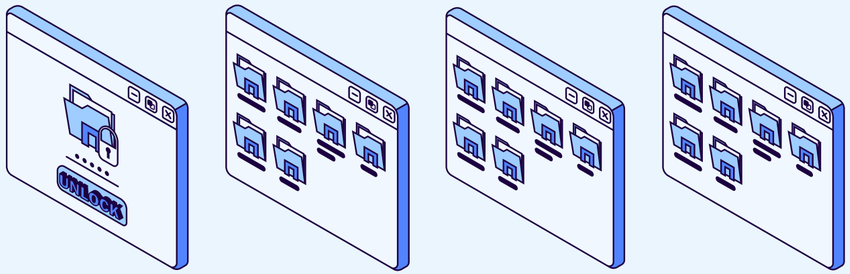


THANK YOU RECOLLECTION WISCONSIN

This series is based on curriculum developed by Recollection Wisconsin, who partnered with UW-Madison and UW-Milwaukee to provide library school students with practical experience in digital stewardship and increase the capacity of small libraries and cultural heritage organizations to curate their digital collections.

Curating Community Digital Collections (CCDC) program and curriculum materials are licensed under CC BY-NC 4.0.
Recollection Wisconsin welcomes the use of these materials to develop your own digital preservation program.

SERIES AGENDA



1 **Tuesday March 31**
Digital Preservation Models & Policy

2 **TODAY**
Prepare for Digital Preservation: Identifying, Assessing & Prioritizing

3 **Tuesday April 28**
Digital Storage 101

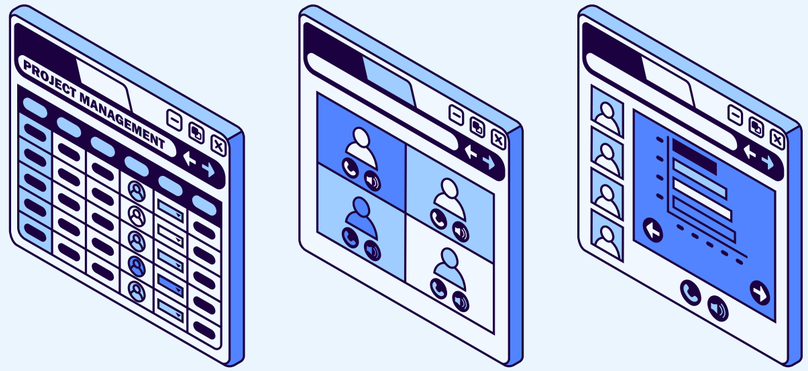
4 **Tuesday May 5**
Digital Collection Development, Outreach & Programming

WEBINAR #2 AGENDA

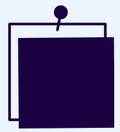
Here are the topics we will cover this afternoon:

12:00 PM to 1:00 PM: Presentation
1:00 PM to 1:30 PM: Questions, comments, show & tell...

- Introducing the Digital Readiness Toolkit
- Identifying & Assessing: Why do we need to know what we have?
- Prioritizing: Why not save everything?
- Obtain Permissions
- Next steps:
  - Digital Readiness Self-Assessment
  - Digital Project Planning Worksheet



WHAT CAN WE DO?



1. Digital Preservation policy
- Document your decisions
- Plan for the future

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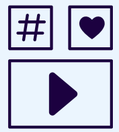
2. Collections Inventory
- Identify what you have
- Prioritize what you need to keep



3. File/folder management scheme
- Get organized! Get the (digital) boxes off the (digital) floor

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4. Research and make recommendations for 3-2-1 storage solutions
- Store more than one copy of your files
- Integrity check your data

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5. Connect with communities of practice for ongoing support
- You don’t have to go it alone!

Key Definitions:
Digital readiness

Having the knowledge, tools, resources and infrastructure to provide online public access to archives and historical records, and the ability to preserve obsolete audiovisual formats and provide long-term storage of digital records.

Recollection Wisconsin, Digital Toolkit (2023)

Digital Readiness Toolkit (2023)
Recollection Wisconsin

Focus Areas and Levels

- **Planning and prioritization**: What is your project plan and how will you decide what to digitize?
- **Permissions and copyright**: How will you know if you can share these materials?
- **Digitization**: How will you undertake the actual digitization work?
- **Description**: How will you describe the digitized materials?
- **Sharing and access**: How will you share what you've digitized?
- **Storage and maintenance**: What is the long-term plan for storing digital materials?
- **Evaluation**: How will you know that what you set out to do was achieved?

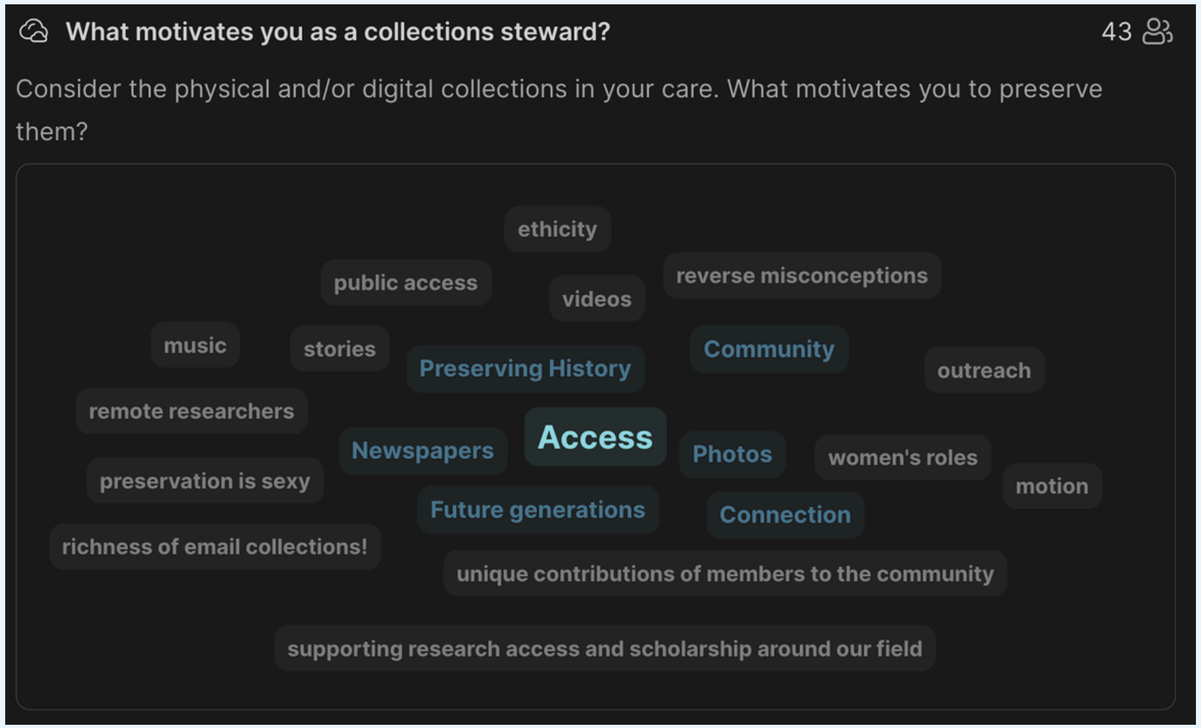
Digital Readiness Levels

The Digital Readiness Levels are a structured roadmap for public history organizations to plan and sustainably grow their digital initiatives in order to improve access to collections.

Focus Area	Bronze	Silver	Gold
	Laying a strong foundation	*Putting it into practice*	*Refining and sustaining*
Plan and Prioritize	Set goals for digital work that fit the organization's mission and policies. Adopt a digital mission statement or revise existing mission statement to include digital work.	Identify and prioritize potential digital projects. Make a digital project plan that includes roles, activities, required resources and partners.	Adopt a digital collection development policy or revise existing policy to include digitized and born digital content.
Obtain Permissions	Create and use permission forms and donor agreements that include specific language for the use of digitized and born digital content or modify existing forms.	Evaluate copyright status of content. Identify items with access restrictions or concerns, including privacy, ethical, or cultural considerations.	Assign standardized rights statements or Creative Commons licenses for collection items. Adopt a takedown policy and, if applicable, a statement on harmful content.
Digitize	Determine standards and procedures to be used to digitize physical materials or process born digital content.	Using identified standards, undertake digitization or born-digital processing work either in-house or with an appropriate vendor or partner.	Use a quality control checklist to review content and confirm it meets identified standards.
Describe	Adopt a consistent naming convention for digital files. Determine standards to be used to describe digital content.	Using identified standards, create basic descriptive metadata for terms.	Develop a data dictionary and use controlled vocabularies to standardize metadata.
Share	Review goals and options for providing access to content. Choose an access platform or system that meets identified needs.	Make items and associated descriptive information available for discovery and repurposing.	Implement techniques to support accessibility of online content, including alt text, transcripts, and other best practices.
Store and Maintain	Create and maintain a collection-level inventory of digital content.	Store at least two, preferably three, copies of each primary file and related metadata, with one copy stored off-site. Check and refresh storage media on a regular schedule.	Plan for future storage needs. Use software tools to check file integrity.
Evaluate	Identify primary users and ways to engage them with digital content.	Collect data and stories about how digital content is stored.	Use collected data and stories to inform future collection development, outreach, and programming. Share knowledge with other practitioners to build community around digital work.

FOCUS AREA 1: PLAN & PRIORITIZE

PLAN...



Why preserve?

What are your goals? What results do you want to see? How will this work advance your organization's mission? How will it serve the needs of your community?

What's your mission?

Refer to your DP policy about the importance of DP to your organization, which can be tied to your mission and collection development policies.

...AND PRIORITIZE

	No	Maybe/ Unsure	Yes	Absolutely!
Value: Is there interest or value in these materials for genealogists, educators, researchers, community members, or other identified audiences?	1	2	3	4
Value: Do the materials contribute new voices or perspectives to the historical record (for example, materials document historically underrepresented groups in our community)?	1	2	3	4
Information context: Is there enough information available to add useful context (we know or can find out names of people, locations, dates)?	1	2	3	4
Availability: Are the materials unique and not already available online?	1	2	3	4
Legal/Ethical issues: Are the materials in the public domain (or we can get permission from the copyright holder) and there are no privacy concerns or other barriers to putting them online?	1	2	3	4
Condition: Are the materials in high-risk, deteriorating formats, particularly audiovisual recordings on media like audiocassettes, VHS tapes, CDs, or DVDs?	1	2	3	4
			TOTAL SCORE:	

18 – 24 points: High priority for digitization
12 – 17 points: Medium priority
6 – 11 points: Low priority

- Significant to your community? Requested by users?
- Significant voices?
- Available description?
- Unique? Original, master, or best available?
- Clear rights status and/or permissions? Non-commercial? Public domain?
- Unusual or obsolete format?
- Fragile, damaged or deteriorating?
- If lost would your organization spend its resources to replace it?
- Your responsibility?
- Other considerations?

WHAT ARE YOUR PRIORITIES?

Consider the physical and/or digital collections in your care.
What's significant to your organization and your community?
Follow the link in the chat or click on the QR code to respond...

WHY INVENTORY?

What do you have?

Where is it?

Do we need to save everything?

What can you expect during the preservation process?

An inventory is the best way to identify content. This means going to the shelves, opening boxes, opening hard drives, and getting the pleasure of knowing for certain that the materials are there!

Assess value and condition as you inventory

Use information gathered to set priorities

This inventory can be used to create a finding aid or catalog records

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For generating basic metadata fields: a partial inventory is a good start

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Keep it simple. Over complexity could lead to underutilization. Spreadsheets are fine.

SCOPE & SCALE

Ampex Videofile Information System (1969). Stanford University, Manuscripts Division and University Archives

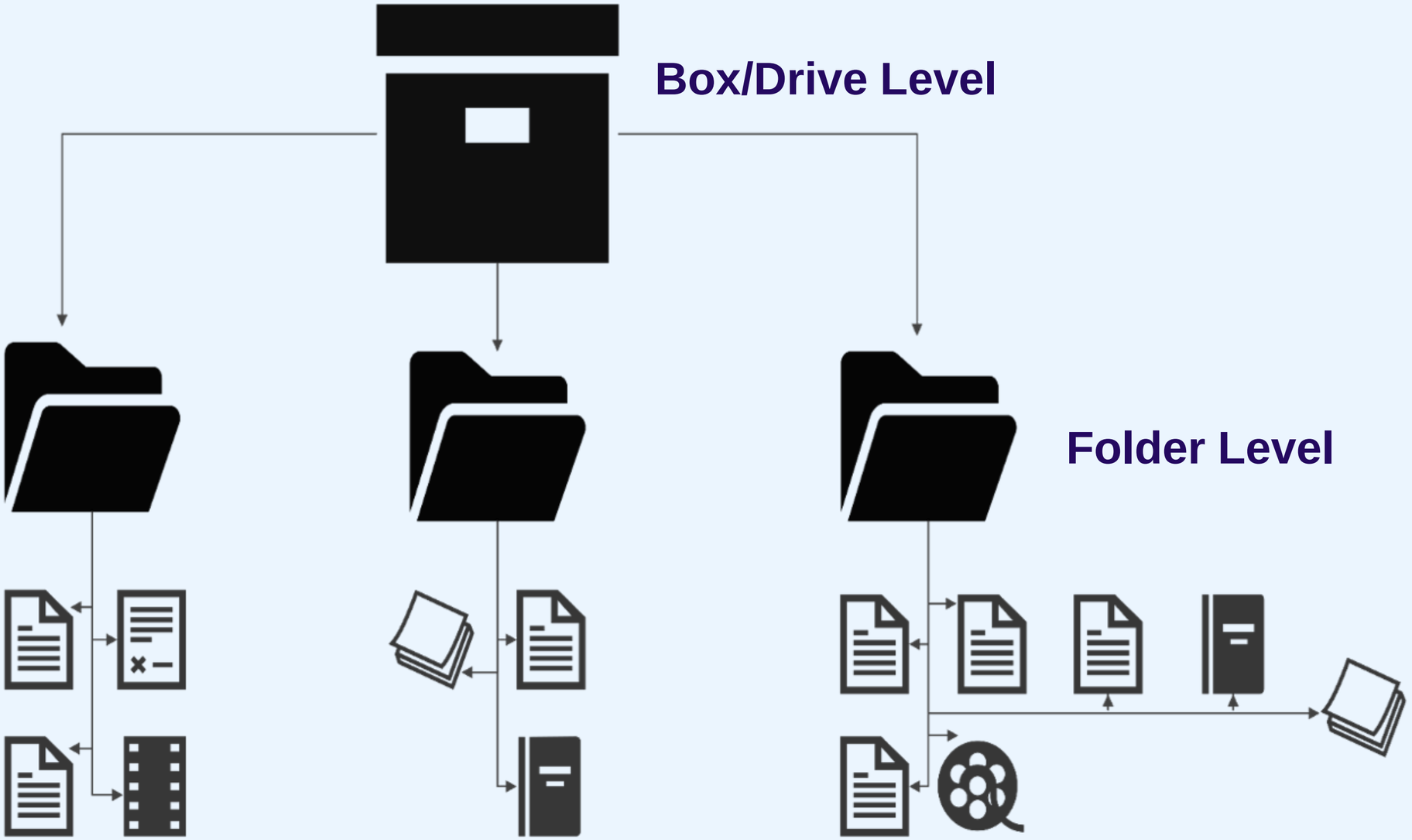
Scope: Subjects, locations, date ranges, etc.
For example: Photographs and postcards from 1870-1970 depicting buildings and people in Nevada County.

Material Types

- **Still image** (photographs, slides, postcards, illustrations, posters)
- **Text** (Letters, diaries, maps, books)
- **Moving image** (film, video)
- **Sound recording** (audiocassettes, open reels)
- **Existing digital files** (digitized materials, born-digital materials, emails, websites)

Approximate numbers: Ideally, by material type

LEVELS OF DESCRIPTION FOR AN INVENTORY



RECOMMENDED FIELDS (ITEM-LEVEL)

- Organization
- Title
- Object ID
- Created Date
- Creator(s)
- Significance/Description
- Permissions
- Condition
- Material Type
- Format
- Extent/Number of Parts
- Dimensions/Duration
- Location

RECOMMENDED FIELDS (COLLECTION-LEVEL)

- Organization
- Collection Title(s)
- Range of Object IDs
- Created Date(s)
- Creator(s)
- Significance/Description
- Permissions
- Condition
- Material Type
- Format
- Number of Parts (Folders/Files)
- Size of collection (Linear Feet/GB/TB)
- Location (Room/Shelf/Server/Drive)

RESOURCES & ROLES

The Kef Time Jrs. Band (Hye Class Band): Jim Karagozian (kanun); Harold Hagopian (clarinet); Jimmy Zerounian (bass) (1980/1981) Armenian Studies Department, California State University, Fresno

What other resources will you need to successfully complete this project?

- Skills and knowledge (training, guidelines, technical standards)
- People (staff, volunteers, interns, vendors)
- Hardware (scanner, digital camera, computer)
- Software (image editing, text recognition)
- File and data storage (server, cloud, external hard drive)
- What else?

Who will contribute to the project?

- Project management
- Digitization
- Metadata
- File management
- Outreach
- Who else?

FOCUS AREA 2: OBTAIN PERMISSION

WHAT IS THE COPYRIGHT STATUS?

If the copyright status is . . .	Then . . .
No copyright in the United States – in the public domain	**PROCEED.** Describe how the public domain status was determined (i.e. publication date).
In copyright – our organization is the creator and copyright holder	**PROCEED.**
In copyright – copyright holder has granted permission to use	**PROCEED.** Make a note of when this permission was granted and where it is documented.
In copyright – Rights-holder(s) Unlocatable or Unidentifiable – need to obtain permission to use	**PAUSE.** Request permission from copyright holder. If the copyright holder is unidentified, unlocatable, or not responding, document your attempts to contact.
Copyright Not Evaluated – have not yet reviewed copyright	**PAUSE.** Conduct copyright evaluation before digitizing or choose different content.

REQUEST PERMISSIONS

The Candid Parade: A Japanese American Citizens' League (JACL) Production (1940)California State University, Monterey Bay

Defining Due Diligence: Key Questions

1. Who created the work?
2. Who holds the rights to the work now?
3. Where is the copyright holder now?

The Candid Parade: A Japanese American Citizens' League (JACL) Production (1940)
California State University, Monterey Bay

Copyright status unknown.

This work may be protected by the U.S. Copyright Law (Title 17, U.S.C.). In addition, its reproduction may be restricted by terms of gift or purchase agreements, donor restrictions, privacy and publicity rights, licensing, and trademarks. This work is accessible for purposes of education and research. Transmission or reproduction of works protected by copyright beyond that allowed by fair use requires the written permission of the copyright owners. Works not in the public domain cannot be commercially exploited without permission from the copyright owner. Responsibility for any use rests exclusively with the user. California State University, Monterey Bay Library attempted to find rights owners without success, but is eager to hear from them so that we may obtain permission, if needed.

Upon request to archives@csumb.edu, digitized works can be removed from public view if there are rights issues that need to be resolved.

OBTAIN PERMISSIONS: KEY ACTIVITIES

Adopt a deed of gift form that includes language about online access to digitized and born-digital streaming content, downloading, and reuse (or update existing deed of gift form).

Gather existing documentation that may inform copyright and permissions: deeds of gift, donor permission forms, or correspondence with donors. Identify items not covered by copyright (in the public domain).

Identify items potentially covered by copyright and make determinations about appropriate access.

Review items to determine whether privacy, ethical, or cultural considerations will determine appropriate access.

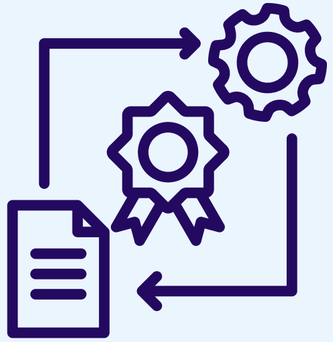
Use standardized rights statements or Creative Commons licenses to describe the copyright status of digital items.

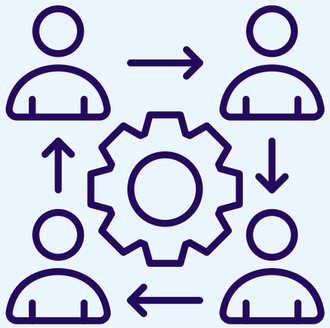
Develop a takedown policy.

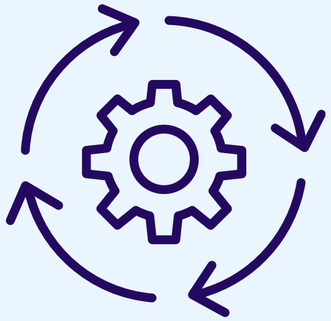
Develop a statement or notice about potentially harmful content.

FINAL THOUGHTS & NEXT STEPS

- Relationship between…**POLICY + DECISION-MAKING + WORK/TASKS**
- Keep the process collaborative. Ask your stakeholders: what is valued / mandated / prioritized?
- Making preservation decisions is largely contingent on an object’s future use. Our approach will differ depending on format, quantity, age and condition of an object or collection. We are comfortable with this ambiguity.
- Remember the principle of digital stewardship as an ongoing, evolving lifecycle.
- Keep inventories simple. Spreadsheets are fine







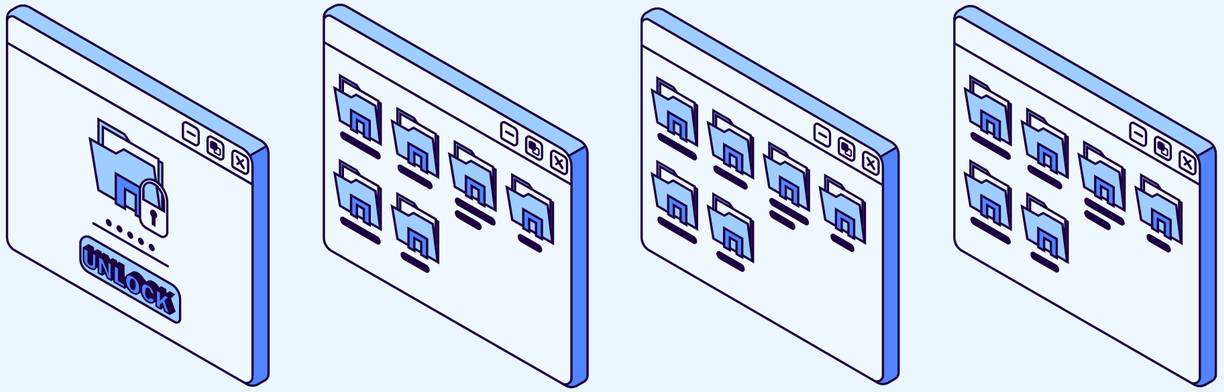
HOW IS YOUR DIGITAL PRESERVATION POLICY DEVELOPING?

QUESTIONS? COMMENTS?

Next Webinar: Tuesday, April 28 12PM (PT)
Digital Storage 101

Reminder for California Revealed Partners!
Request your legacy files by May 31, 2026.
californiarevealed.org/digitalpreservationplanning

Join our Digital Preservation Community
groups.google.com/u/2/g/cadigipres

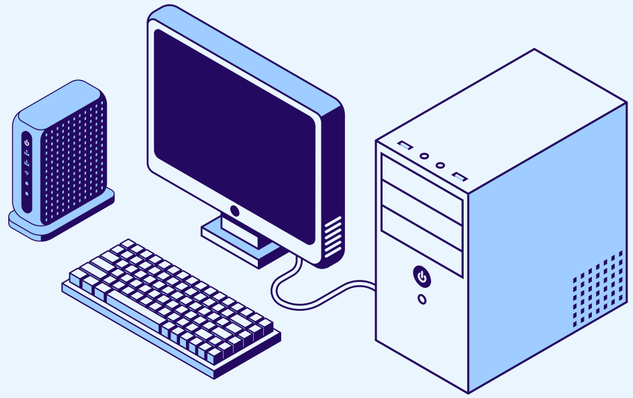


KEEP IN TOUCH!

National City Library (1973)
National City Public Library

team@californiarevealed.org

RESOURCES



Digital Preservation Training Shared Folder: Includes webinar slides and resources

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Recollection Wisconsin - Digital Toolkit: Equips public history practitioners — particularly those doing public history work in small, rural, or underrepresented communities, with few or no paid staff — with the foundational knowledge needed to support digital readiness in their organizations.

Digital Project Planning Worksheet: This worksheet aligns with the seven focus areas of Recollection Wisconsin's Digital Readiness Levels. AV Digital Readiness Self-Assessment: the starting point for an organization assessing its digital readiness, with a focus on audiovisual collections.

California Revealed Inventory Spreadsheet: To individually list, describe, and assess objects in your collections.

Sustainable Heritage Network (SHN): Managed by the Center for Digital Scholarship and Curation Resources, SHN is a collaborative project that complements the work of Indigenous peoples globally to preserve, share and manage cultural heritage and knowledge.

Digital Preservation Outreach and Education Network: DPOE-N offers professional development funding, trainings, workshops, resources, and testimonials related to digital preservation and digital stewardship.